Quality Counts Peer Reviewer Rubric: JR Phalen Leadership Academy

The Quality Counts grant is competitive. A team of expert peer reviewers with experience in school improvement, management and direct experiences with charter schools will review grant applications. Each application will be reviewed a minimum of two times and may include further adjustments or reductions after awards are made. The review of the applications will utilize the criteria listed within the rubric included in the request for proposals.

Proposals that receive higher scores increase their likelihood of approval and receipt of funding at the requested levels. Department staff shall conduct a final review of all applications to ensure the application was completed with fidelity and complies with all requirements. Department staff shall determine the final budget for each subgrant recipient and will determine whether proposed activities are reasonable, allocable, and necessary. If the page limit of the application is exceeded, reviewers may reduce the total score by up to 10%.

Pre-Requisites Satisfied: NEW CHARTER –opened July 2017. No ISTEP data (IDOE Compass) ➔ Eligibility based on application. Attachment C: Annual Performance Report provided in Appendix, p 163, stipulates that "as a new charter school, this item is not applicable."

> Note: Within Charter School Agreement (a March 10, 2017 Memorandum to Authorizer, see p. 150): "Project RESTORE has been implemented in three chronically low-performing schools in Indianapolis, and all three have been transformed from "F" to "A" rated schools. Furthermore, in 2015-16, PLA@93 – which implemented the RESTORE model – achieved the highest ISTEP growth of any school in Central Indiana."

1. Accountability Grade:
    a. Accountability Grade of A or B
    b. Evidence of strong academic results, including strong student academic growth and performance on ISTEP (i.e. above state average)
2. No Corrective Action in the following Categories:
    a. Student Safety
    b. School Finance
    c. Operational Management
    d. Statutory/Regulatory Compliance in Least Restrictive Environment and English Language Learner areas
3. School is not identified for Targeted Support and Improvement and meets subgroup needs through demonstrated success in significantly increasing student academic achievement, including graduation rates, for all students served by the charter school:
    a. Economically disadvantaged
    b. Major Racial and ethnic groups
    c. Students with disabilities
    d. Students with limited English proficiency

Peer Reviewer Instructions: The peer reviewer shall determine the band that best fits the holistic evaluation of each section in the grant narrative and then determine the strength within that band to arrive at a score. The peer reviewer shall provide a comment if a 0, 1, or a 6 is assigned.

Optional Competitive Preference Priority 1 (CPP1): Early Childhood, ==Postsecondary==, and/or Rural Areas

0	1	2	3
Not included in the application; model will not focus upon any of the priority areas	Area of focus is indicated, but expected targets and outcomes, and specific populations are not mentioned.	Area of focus is clearly defined, expected targets and outcomes are described, specific populations are mentioned.	Area of focus is clearly defined, expected targets and outcomes are clearly described and supported by qualitative or quantitative data or specific measurable and assessable goals. Unique populations are clearly defined and described quantitatively and qualitatively.

Comments: **SCORE: 3**

Page 21

- *Area of Focus*: Middle school is a critical early warning period where most students who will not complete HS show first clear signs of disengagement. Achieving at high levels in MS is one of most important predictors of whether a child will attend and succeed in college. Limited options to attend a HQ MS on Far Eastside, particularly for low-income students and students of color. (JRPLA = 93% F/R and 90% African American & Latino.)

  Expected Targets & Outcomes: Will use proven PLA Restore educational model, providing strong foundation in core academic skills, and *preparing students for college & careers* via (1) a "growth mind-set" instructional model focused on rapid feedback & growth/closing achievement gaps; (2) integrates activities that introduce modes of learning found in college & careers (small-group advisory programs; activities using interdisciplinary teachers; project-based, hands-on exploration; encouraged autonomy, choice and active investigation; 9-wk independent research projects; STEM learning embedded; cutting-edge software); and (3) offering students (scholars) early, direct exposure to college & careers (regular college visits each quarter – meeting with college advisors/faculty/mentors).

  Qualitative/Quantitative Data or Specific Measurable/Assessable Goals
- *Unique Populations Clearly Defined*: One of Indiana's most educationally and economically disadvantaged communities, Far Eastside of Indy. Currently, no "A" or "B" rated public middle schools available within this community (as of 2016-17, most students in schools with "F" since 2012, where only 4% passed ISTEP in ELA and Math (IDOE, 2017).

1. Charter School Vision and Expected Outcomes:

0	1-2	3-4	5-6

No description provided or cited.	Charter School vision included, no clear indication of community need/community communication, curriculum framework mentioned but not expanded upon, no clear description of how educational program will meet Indiana's academic standards or how students will develop 21st Century skills, nor a clearly defined sustainability plan beyond the life of the grant.	Charter school vision included, community need and communication plan outlined. Curriculum framework, key instructional practices, and curriculum development guide outlined. Methodology for the proposed program to reach all learners is explained. A plan for how students will develop 21st Century skills is present and a sustainability plan post-grant is outlined.	Charter school vision is fully developed and described, evidence to support community need for this program is clearly defined and presented, and a communication plan is clearly described. Curriculum framework, key instructional practices, and research to support the usage of these is clearly articulated. Specificity is used to demonstrate how the proposed program will support all students in meeting/exceeding Indiana's academic standards. The program's ability to help prepare students for college or develop 21st Century skills is clearly defined. A sustainable, viable plan is articulated to continue the program beyond the life of the grant.

Comments: **SCORE 5 –** Overall, very strong elements, but one element appears accurate (based on Goals section, but references elementary strategies/assessments – and not those anticipated for Grades 7-8.

Page 23
- *Vision Fully Developed/Described*: p.24 -- Ensure more children on Far Eastside have access to a HQ middle school education that prepares them to be highly successful in HS, college & careers. Demonstrate strong academic achievement (meet/exceed performance of their peers throughout city and State). Be prepared for rigors of HS, college & careers. Demonstrate strong character & values and a strong vision for and belief in their futures.

- *Community Need Defined/Presented & Communication Plan*: As of 2016-17, most students attended John Marshall MS (received an "F" rating since 2012; only 4% in Grades 7-8 passed ISTEP in ELA and math in 2016-17). With John Marshall's conversion to serving HS grades this year, no other public schools are dedicated to serving students within this community on the Far Eastside of Indy. When launching JRPLA for 2017-18, applicant group met extensively with parents, community based organizations, district/community leaders to identify student needs and ensure the PLA model would meet those needs. Completed comprehensive assessment of needs/resources available (achievement data, interviews with stakeholders, and site & classroom observations. Through launch and current year, notified community & potential families of the new school (flyers & posters around school campuses; community bulletin boards, churches, libraries, parks, etc.). Personal phone calls and automated outbound calls to share info on launch to encourage enrollment applications. Community engagement event held providing more comprehensive plan, admission policy, & enrollment process.

- *Curriculum Framework/Key Instructional Practices/Research-based*: p.25 -- Cumulative, rigorous and evidence-based curriculum. **Model places unique emphasis on** drilling down on the core skills to help students master literacy by grade 3. Consistent & rigorous evaluations (quarterly benchmark assessments) inform instruction/student groupings and improve performance on achievement tests. Scores posted schoolwide the following day; classrooms compete to earn highest scores each week. Adaptive learning quizzes target specific standards; and qualitative data surveys (scholars, parents & teachers) inform holistic look at progress. *Research cited, throughout, to support each strategy.*
  - Extensive differentiated, small-group and standards-aligned instruction
  - Implement weekly assessments, allows data to drive instruction; regular quizzes are built into classroom curricula & computer adaptive programs. Three times annually, implement formal, interim assessments (p. 26 includes **DIBELS/basic early literacy**)
  - Personalized blended learning: p.26 & 27 references findings for **early elementary students** and Grade 1-5
  - P.27 Literacy Curriculum= Harcourt Journeys; and Saxon Math??

  Parts of this section do NOT align with the proposed program to serve Grades 7-8. NO strategies specific to STEM. Page 27 references the *completion of a task* now proposed for CSP funding (i.e., the *development* of customized pacing guides for ELA & Math). Parts of language used by applicant appear aligned to the PLA K-5 model, and not specifically to JRPLA serving Grades 7-8.

- *Support for All Students/Meet IN Academic Standards*:
  - p 28 -- PLA Restore model provides progress feedback and coaching to help students achieve at higher levels. This happens during daily ELA instructional blocks/small group instruction.
  - Daily differentiated, data-driven instruction and interventions: … "including EL scholars with and those with disabilities." Rotational instructional approach. Small group learning to enable classroom teacher to maximize

number of minutes in individualized instruction available to each scholar.
- o Daily individualized intervention: Small group intervention offered daily to all students thru rotation instructional model, i.e., daily 30-minute targeted intervention block where small groups (typically 3-6 scholars) who perform similarly in that subject work with a teacher/assistant on research-based modules to accelerate their growth.
- o P. 29 -- Personalized, adaptive learnings: self-paced, supplemental adaptive educational software programs (Harcourt Journeys/Collections Online and Dream Box math – customized based on skill level). Audio/visual learning adaptive technologies.

- *Ability to Prepare Students for College OR Develop 21st Century Skills*: p 29 -- Focus on creativity and critically thinking; responsibility, problem-solving and teamwork; knowledge and familiarity with postsecondary educational options and career paths. (Also see Competitive Priority, p 21). Instructional model focuses on rapid feedback and growth mindset to ensure scholars are prepared to succeed in college; introduces modes of learning found in college & careers; and offers scholars early, direct exposure to college and careers (to see how 21st century skills will be applied). Unique focus on character development (Building Dreams/Marlin Jackson) – making positive life choices. Partnered with The Character Formation Project (curriculum to foster positive decision making/integral leadership). Modules highlighting African American role models.

- *A Sustainable/Viable Plan Articulated to Continue Program Beyond Grant Period*: p 30 -- Activities and ongoing costs are designed to become embedded within sustainable systems at the school. Performance management dashboard and coaching cycle web platform are strong examples. PD (to support staff's use of data systems and educators' effective delivery of data-based instruction. STEM training/materials will be embedded within school day for long-term implementation -- and delivered by school's core educators. CSP-funded elements are designed to be sustained by general operating funds, or tapping into Title I, Title II, or a network of philanthropic partners. Many costs are one-time expenditures (meeting safety standards, e.g., building codes; creation of music program; furniture purchases; and instructional equipment, i.e., Chromebooks and iPads.

2. Expertise of Charter School Developers:			
0	**1-2**	**3-4**	**5-6**
No description provided or cited.	Key Personnel are identified. Data and analysis to support the program are vaguely described. No evidence that the proposed program will deliver strong growth and student achievement is presented. No analysis is presented.	Key Personnel are identified and described. Data and analysis that support the program are described. Some connections are made between the data and the program's ability to deliver academic growth and student achievement. Analysis is present but does not reference school's Annual Performance report from DOE Compass.	Key Personnel are identified and their qualifications are clearly described and relevant to the proposed program. Data and analysis that support the ability of the proposed program or replicated program are presented and demonstrate clear evidence that the proposed program will deliver strong academic growth and student achievement. Analysis references school's Annual Performance report from DOE Compass or similar report.

Comments: **SCORE 6**

Page 30
- *Key Personnel/Qualifications Relevant to Proposed Program*: p 30 -- Team's track record and reputation have fostered strong and authentic engagement with students, families and staff. Experienced in building a home-grown movement for schools, customized to the community's needs. All key personnel for JRPLA are presented – along with clearly described qualifications, aligned to the proposed program. Complete bios also provided in Appendix, Attachment G, see p. 180. Team appears to be exceptional, exhibiting the expertise to bring about academic growth and student achievement within a demonstrated high-need middle school, serving Grades 7-8.

- Replicate/Expand ONLY: *Evidence of Prior Success—IDOE APR/Compass Data*: p 32 -- JRPLA was launched in fall 2017. Applying as a **new applicant** (no APR yet available.) Since they are using a proven educational model, applicant provided more information about the model's track record of success. PLA implemented at George and Veronica Phalen Leadership Academy; PLA at School #93, and PLA at School #103…. Overall findings:
  - Transformed multiple failing schools into "A" rated
  - Scholars participating in PLA for two or more years improved ISTEP passing rate by an average of 11% in math and 6% in ELA
  - Two of city's lowest-performing schools elevated to place among the top 10 schools (year-to-year growth on ISTEP)
  - Achieving highest growth of any public school in central Indiana on ISTEP
  - Exceeding statewide passing rate on IREAD each year since testing began.

  School-by-school data was provided for GVPLA Academy, PLA93 and PLA103 to substantiate overall findings.

  Project Restore model was also implemented in two of the lowest performing IPS elementary schools: Arlington Woods School 99 (exceptional growth in both ELA and Math on ISTEP; "F" rating moved to an "A") and Anna Brochlausen School 88 (very strong growth in both ELA and math on ISTEP; moved from an "F" to a "B" rating).

  Schools that have implemented this model have achieved strong results in all key domains of operational management. Pages 33-34 highlight records for student safety; school finance (managed 5 years of clean audits and met/exceeded financial budget in each year of existence); and authorizer, statutory & regulatory compliance (no open corrective action items with IDOE; 100% on-time, accurate and compliant authorizer reports in 2017-18; timely annual submission of all state compliance requirements (accreditation); meeting accountability standards and legal standards.

3. Charter School Goals:

0	**1-3**	**4-6**	**7-9**

Comments:

No description provided or cited.	Description is partial, vague, or unclear. Inadequately addresses academic outcomes of students in a measurable format or include achievement data. Community communication plan is vague or not present.	Goals to address academic needs are described and connections are made to student outcomes. Methods for measuring success towards goals are mentioned but may be unclear. Student achievement data is referenced. A community communication plan is outlined to describe school goals.	Specific, measurable goals are clearly described and how academic outcomes of all students will be addressed and the measurement of progress towards goals is articulated. Student achievement data from state content assessment is included and incorporated into the explanation. A communication plan that has been well-thought out and includes multiple avenues to reach all stakeholders has been articulated with specificity.

Comments: **SCORE 8**

Page p 34

- *3-5 SMART Goals/Measurement Methods*:
  - o Achieve an average of 1.25 years of grade equivalent gain in math and reading, as measured by STAR Reading and Math, a nationally-normed assessment. Students arrive on average 2-3 years behind academically. While one year of growth is standard, it is critical for scholars to gain 1.25 per year to move towards grade-level proficiency.
  - o By end of Year 2 (2018-19), scholars will exceed the average proficiency rates achieved in the local district. (In 2016-17, 22% of 7th grade district students passed math and 39% passed ELA; 20% of 8th grade district students pass math and 33% passed ELA.)
  - o By Year 3 (2019-20), scholars will exceed the State average passing rate on ISTEP math and reading. (State average rate for 7th grade was 51% on ELA and 34% on Math; for 8th grade, 47% ELA and 39% in math.)

- *Assessments*:
  - o *Diagnostic:* nationally-normed STAR Reading and Math; curriculum-tied diagnostic surveys/quizzes; adaptive software place quizzes (also suitable for students with disabilities or special needs)
  - o *Benchmark/Interim Assessments:* quarterly Reading Inventories to measure reading progress (Tier 2 &3 students may be assessed more frequently): STAR Reading and Math at mid-year; curricula-based benchmark test (other subjects; based on their curriculum maps and scope & sequence).
  - o *Formative:* questioning (Bloom's Taxonomy and Webb's Depth of Knowledge); checklists (mastery of specific skills); adaptive software assessments (parents can also monitor students' learning).
  - o *Summative:* ISTEP (state's standardized annual assessment); STAR Reading and Math (end-of-year, nationally-normed test)

- *Communication Plan/Stakeholder Awareness of Goals via Multiple Avenues*: p 36
  - o *Staff*: via pre-service training sessions; will employ a student information system (data analyzes that will allow educator to identify, on a daily basis, skill areas of need); will provide essential coaching cycles (to ensure data is incorporated effectively into instruction)
  - o *Students*: Goals will be shared with students and they will actively participate in their growth. Weekly benchmark assessments will be shared/posted (by classrooms—that compete to earn the highest scores each week); progress feedback sessions will guide student reflection, during ELA instructional block/small group instruction, within classrooms.
  - o *Families*: Families made aware of school's goals—and their scholar's goals via daily, weekly and quarterly feedback. Teachers issue monthly progress reports to families and review scholar's progress with parents during three annual parent-teacher conferences. Portfolios of student work collected quarterly/yearly for each student to help present a clear picture of students' progress. Parents in Touch days. Weekly behavior and effort report cards sent home, requiring signature by family member.

4. Use of CSP Funding:

0	1-2	3-4	5-6

| No description provided or cited. | Budget Narrative is partial, vague, or unclear. Few costs are reasonable or necessary. Explanation of how school will develop and maintain required capacity to continue program after grant life is inappropriate, not measurable, or not adequate. Ideas are disjointed. | Budget narrative addresses most line items and shows connection between the grant goals and the proposed expenditures. Many costs are reasonable but may not be allocable or necessary to reach project goals. Explanation of the program beyond the life of the grant is present but does not make clear how it will be maintained at a high quality level. | Budget narrative addresses each line item and demonstrates alignment between grant goals and expenditures. Nearly all costs are reasonable, allocable, and necessary to support project goals. A plan for continuing the program at a high quality level beyond the life of the grant is clearly articulated. |

Comments: **SCORE 6**

Page 37

Budget narrative specifically and fully details each line item, demonstrating alignment between grant goals and expenditures. **Costs appear reasonable, allocable and necessary** to support project goals. Overall observations:

- Costs associated with acquiring necessary equipment and educational materials and supplies, e.g., desks and chairs; PE, music and playground equipment; curriculum software and materials/guides; Chromebooks & iPads; and data management systems are permissible. Costs are necessary and appear reasonable for the proper and efficient implementation of the grant.
- Likewise, necessary renovations to ensure that the new school complies with applicable health and safety standards are permissible.
- The work proposed by CSP grant-funded personnel is directly aligned to tasks needed to implement the proposed project. NRGs specify that –
  - **P**ersonnel expenses incurred after the school's opening are permitted if these expenses are **associated with initial implementation activities** (i.e., as opposed to ongoing operations), and include such programs as **curriculum development and integration**.
- Grant-funded personnel (with the exception of the proposed Director of Curriculum & Instruction) split their time between ongoing operational activities and initial implementation activities. As such, they must maintain accurate **time and effort records** to document the account of time each employee works on tasks related to the initial implementation of the charter school.

Year 1 (March-June 2018)

Provide Infrastructure for HQ charter school
- Renovations to comply with health & safety statutes (fire safety, fire prevention/suppression; heating, cooling and ventilation/air quality; and health & sanitation codes (water supply and waste disposal systems). – **Year 1** @ $246,000 (no recurring costs in Years 2 & 3)

Develop Systems Needed to Ensure Sustainability of Student Outcomes
- **Performance Management Dashboard** (web-based platform for school info systems, assessments, adaptive software) to continuously track individual student, class and school-wide performance & plan lessons, differentiae instruction, and assign interventions. **Years 1-3**
- **Coaching Cycles Web Platform** (web-based to measure educator performance, target coaching support gleaned from walkthroughs (aligned to RISE performance evaluation). **Years 1-3**

Social-emotional Development/Readiness for Postsecondary Ed
- STEM learning programs – **Year 1** (development/integration); **Year 2** (refinement & launch) and **Year 3**
- High quality musical instruments (digital keyboards, xylophones, violins for class of 25). **Year 2 only**

Years 2 (2018-19) and Year 3 (2019-2020)

Infrastructure for HQ charter school
- Furniture to support small-group and individualized instruction (Year 1 was for 3 classrooms; Year 2 for 6 more classrooms)

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<u>Provide Critical Learning Resources</u>
- Online software licenses -- Years 2 and 3
- Chromebook laptop computers (students) – 50 in Year 2; 50 in Year 3
- iPads (educators record real-time data within Coaching Cycle/educator performance & needs) – 14 iPads in Year 2; 8 in Year 3

<u>Enhancing the capacity of school's leaders/educators to ensure strong academic outcomes</u>

- *Director of Academic Programs*: 35% grant-funded (Year 2) and 15% (Year 3) to lead codification of best practices for curricular planning; providing coaching & ongoing support to instructional leaders on implementation of model; develop, refine & disseminate curriculum planning/implementation Guides; and align training/coaching systems & practices with Guides and student/educator needs. Appears allocable, with tasks directly aligned to initial implementation needs (development/use of newly-developed curriculum guides). Costs will be sustained, post grant via general operating fund/Title I. (Budget p 9)

- *Director of Curriculum & Instruction*: "To-be-hired" full-time/100% grant funded in both Years 2 & 3 ($75K per year) to conduct monitoring & observations (adherence to standards and newly-developed curriculum guidelines; provide ongoing coaching, support & guidance; ensure lesson planning, assessment, & pacing guides align with standards; track progress toward academic goals; and facilitate the integration of social-emotional learning initiatives into educational programming. This position will be retained, post-grant, via general operating fund and Title I.

- *Director of PD*: 35% grant-funded (Year 2) and 25% (Year 3) to oversee implementation of JRPLA training initiatives (oversee development of content & systems; evaluate implementation of trainings/suitability to educator needs; provide coaching/implementation support to pre-service trainers; integrate content & best practices into PLA University (an online web-based module that educators can access for support of their PD). Appears allocable, with tasks directly aligned to initial implementation needs. Costs will be sustained, post grant, via general operating fund.

- *Coaching Cycles Specialist*: 30% grant-funded (both in Years 2 & 3) for conducting walkthroughs/observations of educators; overseeing implementation of ongoing PD via Coaching Cycle systems; and supporting data analyses from Coaching Cycles to ascertain educator needs. Appears allocable, with tasks directly aligned to initial implementation needs (of new data platform). Costs will be sustained, post grant, via general operating fund and Title II.

Sustainability: p40 – CSP funds used, in large part, to build staff capacity to support HQ implementation beyond grant term. Data management systems will be fully operational (including the Coaching Cycles web platform), as will the STEM and musical programs that will be established by the grant. High-cost renovations to comply with applicable health/safety standards will be in place. Plans for sustaining recurring costs are detailed on Budget, p9.

5. School Governance Plan and Administrative Relationships:

0	1	2	3
No description provided or cited.	The school governance structure description, school staff connections, and existing relationships with EMOs and CMOs explanation is partial, vague, or unclear. Information regarding school operations, charter school leader's decision making process, and staff cohesiveness is not evident, measurable, or adequate. Relationship between charter school leadership, governing board, and/or authorizer is poorly described. No plan for how timely and accurate data will be submitted. Ideas are disjointed.	The governance structure of the school is described but school staff connections and existing relationships with EMOs or CMOs are not adequately explained. A description of school operations, charter school leaders' decision making process, and staff cohesiveness is present. School board member recruitment process and board governance training are vaguely described. Relationship description between charter school leadership, governing board, and/or authorizers is described but lacks ability to demonstrate lack of conflict of interest. Data submission plan described.	The governance structure of the school is clearly described, articulating connections between school staff, any existing partnerships with EMOs or CMOs are clearly defined. School operations and charter school leaders' decision making process, as well as staff cohesiveness are explained with specificity. The school board member recruitment process is methodically described. Appropriate evidence of a governance training for board members is presented. Relationship description between charter school leadership, governing board, and/or authorizers is clearly described and demonstrates no conflict of interest. Data submission plan described and demonstrates ability to submit timely and accurate data.

Comments: **SCORE 3**

Page p 40
- *School will not partner with a CMO.* Teachers (supported by school leaders and necessary guidance & resources) have direct impact on outcomes of scholars & are considered key members of JRPLA. (With multiple schools, PLA has a central office that provides support, e.g., PD, payroll, policy development, legal matters, and grants management). Educators & school leaders can, thereby, maximize their time and capacity on delivering HQ educational experiences. MS staff will be employing a proven educational model and the range of core services scholars need.

  Principal ➔ reports to governing board. Governing board ➔ accountable for school performance, budgeting/financial oversight; authorizer accountability reporting; and legal and facility support. Key board responsibility is to ensure financial viability of school. (Board members represent a diverse range of skills and expertise.)

- *Leader's Decision Making Process/Staff Cohesiveness*: Data-driven decision making guides JRPLA, enhancing school leaders' sense of autonomy and empowering daily decisions of educators. Data Specialist and a Data Dashboard will integrate school systems (student info, gradebooks, assessments, etc.) to facilitate effective decision-making. It also informs staff development decisions. Employs a Coaching Cycle framework to help educators develop and grow, while simultaneously helping leadership team manage school educational goals. Use of PLA's resource allocation system aligns both operational and financial decisions with the educational needs of scholars (school management decisions/educational priorities).

- *School Board Member Recruitment Process (current & prospective)*: Strong board already in place, possessing expertise and skillsets in core functional areas. Diversity of board is an important factor: currently 57% of board and more than 70% of school leaders are people of color. Standard process established for selecting new board member or filling vacancies detailed on p 42. Expectations of members also summarized. After vetted, interviewed, site visit, and sharing candidate feedback, mutual decision by nominating Board committee is made.

- *Governance Training for Board Members*: Board already possesses high levels of expertise (served on education nonprofit or school boards; experienced in identifying suitable facilities & developing community outreach plans) PLA does not rely on one-time training session/s, delivered by a consultant. Instead, governance training is a continuous

Comments:

experience (determined in large part by an internal skills gap assessment), focusing on such things as: understanding model and best practices (via online e-learning platform, PLA University): school visits/classroom observation; data-dives and best practices sharing from instructional leaders; guest speakers from leading educational institutions; and needs assessment conducted by outside consultants. Goal is for the governing board and educators to work together as a team, developing strong working relationships with school leadership.

- *Relationships Described (among school staff/governing board, and/or authorizer with EMO/CMO). No conflict of interest*: No EMO/CMO (as previously indicated). PLA is grateful to work with ICSB (authorizer) which has provided invaluable guidance, feedback and support for JRPLA. Long-standing relationship with ICSB (since 2013) is built on mutual trust and respect. Last year, they engaged in extensive due diligence process to ensure successful launch of JRPLA, with ICSB serving as a key thought partner in the execution of submitting all required pre-opening elements.

- *Plan/ability to submit timely & accurate data*: PLA has been timely in their compliance reporting to the Indiana Charter School Board, meeting all compliance and operational reporting deliverables. This reporting process also helped guide internal planning for the school. Support provided to JRPLA by the central office facilitates and ensures timely and accurate submission of data for State and federal reporting requirements.

6. Student Recruitment and Admissions Process:

0	1	2	3
No description provided or cited.	Student Recruitment plan description is partial, vague, or unclear. No evidence to show compliance with Indiana code 20-24-5 is offered. Public lottery process is poorly described or not present.	Student recruitment plan is described and evidence of compliance with Indiana code 20-24-5 is offered but may not be complete. Public lottery process is described.	Student recruitment plan is clearly articulated and evidence of compliance with Indiana code 20-24-5 is presented. An appropriate public lottery process is clearly described.

Comments: **SCORE 3**

Page 44
- *Student Recruitment Plan Clearly Articulated/Evidence of Compliance with IC 20-24-5*: Multi-pronged advertisement & recruitment plan, compliant with IC 20-24-5. Personal phone calls; launch regularly scheduled automated outbound calls to share info on new school & encourage completion of enrollment applications; mail enrollment packets (with pre-paid postage); notify community/families via flyers & posters around school campuses and highly visible channels in community (churches, libraries, parks). Host community engagement events (roller skating parties and "open houses") that provide comprehensive view of new school, admission policy, and enrollment process.

- Student admission is not limited in any manner. School enrolls any eligible student that submits a timely application -- and uses random drawing in public meeting, if all interested students cannot be accommodated.

- *Appropriate Public Lottery Process Clearly Described*: p 45 – If more apply than seats available in one or more grades, school places names of all students desiring to be in the relevant grade into a lottery. Lottery conducted at school/or public venue. Some *examples* of procedures identified include:
  o Scholars enrolled in previous year, in good standing, entitled to reenroll and not be part of lottery.
  o First-time applicants with siblings (older or younger), enrolled the previous year, in good standing and is returning, entitled to enroll and not be part of lottery.
  o Once all seats filled for a particular class, lottery drawing continues until all names are drawn (to determine the waitlist order for each class).
  o Enrollment priority given to children of PLA staff or Academy Board. **FYI:** To receive Quality Counts CSP funds, this preference must be limited to 10% of charter school's total student population.

  An extensive list of procedures is presented by applicant on pages 45-46, all in compliance with IC 20-24-5.

7. Meet the Needs of Educationally Disadvantaged Students

0	1-2	3-4	5-6
No description provided or cited.	Proposal offers partial, vague, or unclear explanation of how school will complete with state and federal law to deliver services to students with disabilities, English learners, homeless students, and neglected and delinquent students. Explanation does not seem appropriate, measurable, or adequate.	Proposal presents explanation that may be somewhat unclear to describe how school will comply with state and federal law to deliver appropriate services to students with disabilities, low-income students, English learners, homeless students, and neglected and delinquent students. Explanation is generally, but not fully, appropriate, measurable, or adequate.	The proposal demonstrates how the school will comply with state and federal law to deliver appropriate services to students with disabilities, low-income students, English learners, homeless students, and neglected and delinquent students. Specific evidence to support the above mentioned areas is present.

Comments: **SCORE 6**

Page p 46
- *Students with Disabilities*: JRPLA is committed to FAPE. Will also implement written polices & procedures (approved by IDOE) that ensure all children who need special education & related services are identified, located, evaluated and served as required by IDEA (ages 3-22). Will provide appropriate education in the least restrictive environment and provide support determined via child's IEP. Team will use RTI process to identify students who qualify for special education services. At any point in RTI process, a parent/guardian or staff member may request a formal evaluation to determine eligibility. Parental consent will be obtained and Principal or Special Education Coordinator will form the Multidisciplinary Team and conduct an evaluation (same as an IEP Team). Case conference committee determines scholar's eligibility and needed services. IEP meeting identified need developed. Full continuum of services provided (e.g., LD, MM, ED, VI, hearing, speech, language services, behavior management, PT, interpreting, and special transportation)

- *Low-Income Students*: 93% of enrolled students eligible for F/R lunches. Rigorous staff selection process focuses on selecting educators who have deep commitment to – and proven track record in –helping raise achievement of economically disadvantaged. Vast majority of arriving students are already multiple years below grade level. JRPLA model is designed to provide the level of personalization needed. Model proven highly effective at raising the achievement of children from poverty. Range of opportunities provided not typically available (e.g., exploration of interest, awareness of postsecondary education and possible career paths; hand-on enrichment courses in the arts, STEM, culture & citizenship, and out-of-class opportunities that build excitement for college and careers. Teachers are trained to authentically partner with families. Partnerships with local service providers will be formed to help children/families living in poverty overcome daily challenges.

- *EL*: EL scholars will spend as much time in the mainstream classroom as possible. Teachers will be given extensive, ongoing PD on how best to serve EL scholars. Instructional approaches will be rooted by research via the Center for Applied Linguistics. (Instructional strategies shown on p 47.)   Limited English scholars will be assessed using LAS Links, and given access to services designated for ELLs, including auxiliary texts, supplemental curricular tools and time with staff specifically trained in best practices for serving EL scholars.

- *Homeless*: At policy level, JRPLA will implement written policies & procedures ensuring all children with disabilities who are homeless/wards of the State and who need SpEd services are identified, located and evaluated, per IDEA. All homeless children will be provided stability, consistency, and support both inside & outside of school. Personalized instruction (small-group and individualized), where students feel cared for and listened to – and where they feel a strong level of engagement in learning. Social worker is employed to provide on-site care for students and work closely with high quality local social service providers to refer students/families for appropriate services (e.g., facility assistance and mental health care).

- *N/D*: p 48 -- Students have access to extensive academic and social-emotional supports, both in and outside of school. JRPLA uses PBIS to share its school culture and discipline practices—promoting positive behaviors and maximizing

extent to which N/D scholars are included in the classroom. Daily, SpEd providers and counseling personnel work closely with educators to ensure use of inclusive teaching model. Support personnel develop, implement and manage FBA and BIP to identify potential behavioral challenges and provide customized supports.

JRPLA collaborates closely with external agencies to ensure N/D scholars receive adequate services (e.g., Meridian Health Services and Gallahue Mental Health Services provide wrap-around behavior supports, including psychiatric evaluation, diagnosis, and on-going home and school-based therapy). Also work with Child Services departments to identify homeless/foster students and provide needed social supports. All staff members at PLA are duty bound to report any suspected or explicit abuse or delinquency of any scholar. PLA engages probationary services to ensure frequent, ongoing communication and alignment in services; engage families and probationary officers in the success of students; and to coordinate intensive behavioral support services.

8. Community Outreach Activities:

0	1	2	3
No description provided or cited.	Evidence of parent, student, and community involvement in the planning and design of the charter school is partial, vague, or unclear.	Evidence of parent, student, and community involvement in the planning and design of the charter school is offered but does not seem fully appropriate.	Clear evidence of the involvement of parents, students, and community in the planning and design of the charter school is presented.

Comments: **SCORE 3**

Page p 49
- *Parents, Students & Community Involved in Planning/Design*: Community is involved in the planning and design of school from the very beginning. Instructional leaders and staff provided input to design & develop their educational model. All instructional staff attended pre-service training and bi-weekly meetings where planned elements of academic and enrichment model were outlined. Input solicited form PLA partner school in Indy in order to design the structure of the educational model's social-emotional programming. Parents & community members actively engaged and informed of proposed implementation via pre-launch open houses; community meetings; surveys during meetings regarding their children's enrichment interest and needs. PLA has relied on its partnership with ICSB throughout the design of the JRPLA. IPS schools 93 and 103 were also invaluable partners during design stages. Over the last several years, the school leaders and educators at these schools have worked with scholars now attending JRPLA –and have deep understanding of student and community needs. These relationships have benefitted recruitment, enrollment and family outreach efforts. During planning process, these schools helped to customize student progress incentive, as well as enrichment experiences to best suit the middle school scholars' interests. Family engagement is important, therefore, teachers are trained to effectively communicate with parents, create a welcoming environ, discuss academic and behavioral program, and host fun events to celebrate progress. To engage families, use strategies such as: door-to-door pamphleting & canvassing; town hall events; attended community and home school association meetings, visited YMCA, Boys & Girls Clubs, churches and other organizations serving their target population; radio, newspaper, direct mails, and social media advertising.

9. Fiscal Management Plan:

0	1-2	3-4	5-6
No description provided or cited.	A plan or process for maintaining internal controls over expenditures and record maintenance is partial, vague, or unclear. Explanation for charter school leadership responsibility for grant does not seem appropriate or adequate. Minimal or disjointed explanation for how state and federal funds will support school operations and student achievement is offered.	A plan or process for maintaining internal controls over expenditures and record maintenance is generally described. The grant management process is described. Charter school leaders are mentioned as responsible for the grant but explanation does not seem fully adequate. A description for how other state and federal funds will support school operations and student achievement is described but not fully adequate.	A plan or process for maintaining internal controls over expenditures and record maintenance is clearly articulated. The grant management process is clearly defined. Charter school leaders are demonstrated to be responsible for all aspects of the grants and not the CMO/EMO. A sufficient description for how other state and federal funds will support school operations and student achievement is provided.

Comments: **SCORE 6**

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- *Internal Controls/Record Maintenance*: Comprehensive internal financial control framework, plus strong financial controls over expenditures and records retention procedures in place. Controls are clear, consistently followed, and aligned with financial reporting requirements of the ICSB, the IDOE, the SBOA, and the USDOE.
    - o Central office is authorized by Board to approve and make expenditures for insurance, payroll/taxes, and any payment required to comply with any agreement approved by the Board (e.g., technology fees). All service contracts supported by a current written contract. Compensation for goods and services are not paid in advance of receipt; all invoices paid in a timely manner (within 30 days when possible). Invoices require full itemization and match to purchase requisition.
    - o Director of Finance prepares all checks to fulfill obligations on expenses approved by central office. Finance director creates the check and records the payment, but does not have signatory authority
    - o Expense reports completed and submitted to Operations for initial review of supporting documents and compliance. Upon approval, Director of Finance reviews expense reports/documentation and prepares check for signature by the CEO.
    - o Normal monthly operating expenses (e.g., utilities, rent, & phone) are approved by Operations. Once approved, invoices submitted to Director of Finance for process and check signed by CEO.
    - o On a monthly basis: All payable accounts are reconciled to vendor statements; and all check payments are reconciled to bank statements.

    Record retention procedures are designed to abide by all Federal and State legal requirements. Pertinent documents that PLA retains indefinitely (e.g., records of incorporation, bylaws, corporate charter, 501(c)(3), Board minutes; annual reports, financial audits; tax returns; etc.) have been specified on p 51. Confidential data is destroyed by shredding or using a Certified Document Destruction vendor. Financial records are retained for the longer of 7 years or per Federal/State requirement. All ledger entries are designated to the appropriate general ledger account and class—with a clear audit trail to support details. Inventory records are maintained in a secure location, accessible upon review. Equipment, inventories, and other assets are secured physically and inventoried regularly.

- *Demonstration that Charter School Leaders Responsible for All Aspects of CSP Grant (not EMO/CMO)*: **No EMO/CMO.** School leaders drive development and implementation of project budget (assessed school & student needs & determined ways grant funds can best impact student achievement and project goals). JRPLA will follow established accounting methods. School leader will oversee day-to-day implementation of grant. Leader will procure multiple quotes, recommend best, and submit purchase requisitions to the finance office. Finance office will work collaboratively with school leader to ensure that expenses are allowable and reasonable. All inventories tagged,

barcoded and tracked; fixed asset schedule maintained at front office and updated monthly.

All grant expenditures will be assigned to the grant in the school's accounting system. This allows staff to identify and record transactions as part of the grant, describe transactions in detail (for classification/financial reports) and record them in the propose accounting period.

- *Describes How Other State/Federal Funds Support Operations/Achievement*: This is detailed within budget. Basic state funding covers core educational costs (core teaching/subject curricula). Title I funds will be coordinated to support personnel identified for this grant, with CSP funds primarily focused on staff time that enhances the capacity of their educational program. The use of other federal funds (e.g., Title I and Title II) is specifically shown in sustainability plans detailed throughout the proposal – and within the budget narratives.

10. Facilities:

0	1	2	3
No description provided or cited.	A vague or unclear school facility plan is presented, and does not incorporate student enrollment's impact on facility needs. Transportation plan is mentioned but does not seem appropriate or adequate.	A generally appropriate school facility plan is presented, mentioned student enrollment and an adequate explanation of how student enrollment impacts facility needs. A transportation plan is described but may or may not be appropriate for student needs.	An appropriate and thorough school facility plan is presented, including how student enrollment impacts facility needs. A transportation plan appropriate for the school's student needs is presented. If transportation is not aligned with the needs of the school, this should be explained.

Comments: **SCORE 3**

Page p 52
- *Facilities Plan Presented (including how enrollment impacts facility needs)*: JRPLA launched in 2017-18 with six classrooms serving 125 scholars. Goal is to ultimately serve 350 scholars. To do this, PLA will expand facility and add approximately nine additional classrooms.

  Through CSP grant, classrooms are designed to provide for personalize learning experiences throughout the school day and year (rotational stations; hand-on, interactive learning; project-based learning). Facility is designed to ensure safe and secure learning environment. Controlled access points; exterior doors are continuously supervised; entry points designated to ensure clear view of all guests. A building Monitor greets guests, assigns them name badges, and directs their movement. This Monitor also escorts students to ensure their safety and conducts frequent walkthroughs of school to monitor behavior and detect emergencies. Student pick-up/drop-off policies clearly specified to ensure children are released only to appropriate family members/guardians.

- *Transportation Plan*: While most charter schools do not provide transportation, PLA provides and budgets for the transportation needs of their scholars. Partnership with Miller Transportation (operating three buses) to transport scholars to and from school. School is strategically located to ensure it is within walking distance—and to have easy access for bus pickup. Plan was developed in close consultation with families and staff – and input of an experienced provider (Miller Transportation). **Note that CSP Grant funds are not requested to support these transportation costs**.

11. Signed Charter School Assurances:

0	6
No signed assurances provided that the authorizer, charter school developer, staff, and management organizations will fully comply with the stated activities within the sub grant and employ appropriate internal controls to manage the grant.	Signed assurances are provided that the authorizer, charter school developer, staff, and management organizations will fully comply with the stated activities within the sub grant and employ appropriate internal controls to manage the grant.

Comments: **SCORE 6**

Page 2 = Authorizer signature (ICSB) and **Page 4 = Assurance page** appropriately signed.

JR Phalen Leadership Academy (Grades 7-8)

Total Points (Out of 57): __55_____

Competitive Preference Points (+ Up to 3): __3_____

Total Score (Out of 57): __58____

Additional Peer Reviewer Comments

- Proposal did not exceed established page limitations, i.e., no reduction in points.
- Layout of proposal narrative sections was clearly presented, making the location of information and anticipated key elements readily available.
- All required appendices submitted
  A. Charter Application – p 53
  B. Budget Narrative – p 153
  C. Annual Performance Report – NA for this proposal – p 163
  D. Non-profit Status – p 165
  E. Enrollment/Admissions Policies – p 167
  F. Agreement Contract with EMO/CMO – NA for this proposal
  G. School Discipline Polices – p 173
  H. *Applicant also submitted Team Bios – p 180*